Case Management Search

The Case Management Search module is one of the most useful tools in the counselor's Toolbox 2.0. It also allows supervisors to quickly access caseloads for their counselors or a team.

CM Search Quickstart

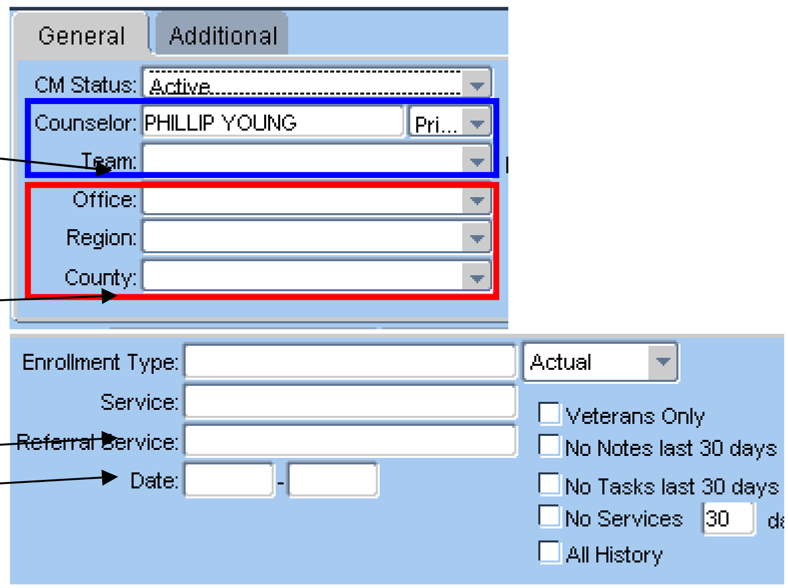
1. ***Pick Search Group***
2. ***Pick enrollment or service***
3. ***Click Search***
4. ***View Results***

Search Group:

Counselor
Team   Returns those served by specific counselor or team.

Office
Region
County   Returns by customer's place of residence.

Select by:
Enrollment
Or Service



The Basics

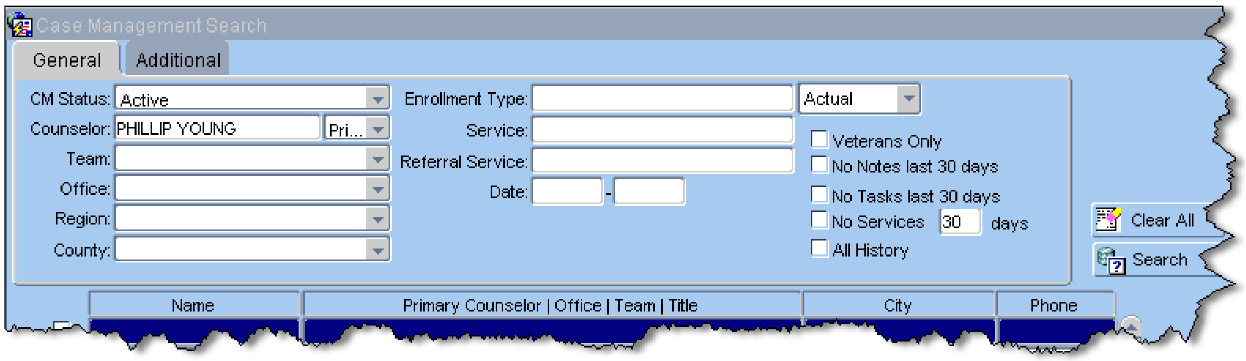
Although the search filters are relatively straightforward, some confusion has resulted from using the Office, Region, and County filters. It is important to remember that ***Counselor*** and ***Team*** filter results by who serves the customer. ***Office, Region***, and ***Count***y filters by where the customer lives.

1. ***Counselor*** will return cases served by that counselor. (To find all cases, be sure to select the drop down for "Both" – returning both Primary and Secondary case management assignments.)
2. ***Team*** will return cases served by members of the selected team. i.e. Jefferson City Career Center team.
3. ***Office***, ***Region***, and ***County*** will return customers residing in (NOT NECESSARILY SERVED BY COUNSELORS IN) the respective area. For example, an office search for Phelps County Career Center might return someone in Potosi served by Washington County Work Connections. The zip code of the customer falls into the Phelps County zip code assignments for labor exchange, but he/she is being served by counselors in the latter station.

Primary/Secondary Assignment

CAP – The CAP counselor should always be assigned as the primary counselor when there is an active CAP enrollment.
PFS – The PFS counselor should always be assigned as the primary counselor unless there is a CAP enrollment.
Assignment of Secondary Counselor must be made through the "Counselor Information" function. (Under "Options" in the context of seeker.)

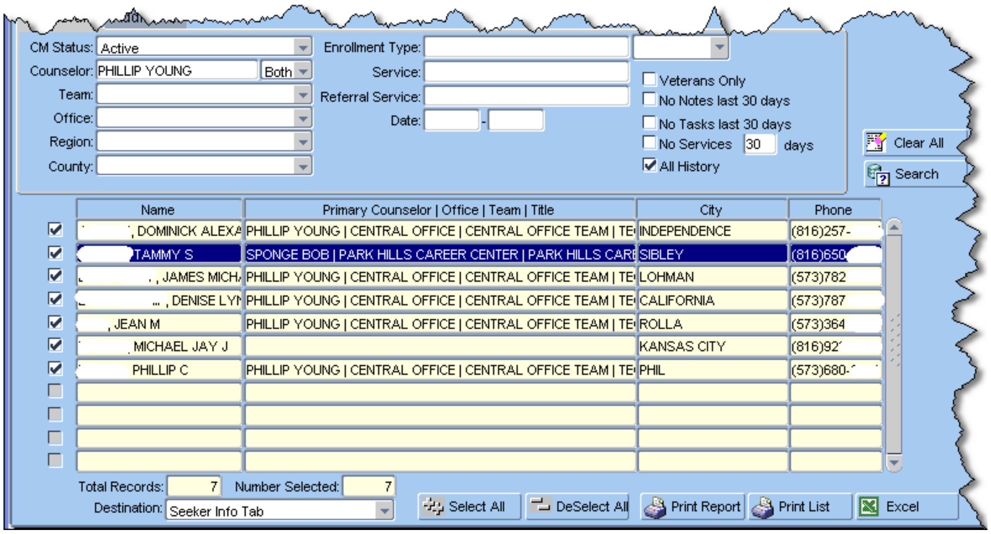
Navigating the Page
Search Filters



1. ***CM Status*** – Allows selection of "Active" or "Inactive" customers.
2. ***Counselor*** – Sets search for specific counselor.
3. ***Primary/Secondary (dropdown)*** – Sets search for customers managed as "Primary" or "Secondary" counselor. This is active on any of the filter choices; not just for a specific counselor.
4. ***Team*** – Returns customers managed by staff members in the selected team.
5. ***Office*** – Returns customers who live in the geographical area served by the selected office. This only applies to the labor exchange settings. Locations that are not assigned a zip code area for labor exchange will return no customers in this search.
6. ***Region*** – Returns customers who ***live in*** the geographical (labor exchange) area served by the selected region. .
7. ***County*** – Returns customers who live in the county (labor exchange area) selected.
8. ***Enrollment Type***: Returns customers who have one of the selected enrollments.
9. ***Actual/Possible/Both*** – Returns customers with either actual, possible (potential), or both enrollments on record.
10. ***Service*** – Returns customers with the selected service currently open.
11. ***Referral Service*** – Returns customers who have been referred to the selected service/agency.
12. ***Date*** – Returns customers whose enrollment was entered between the selected dates.
13. ***Veterans Only*** – Allows restricting the search to only veterans.
14. ***No Notes last 30 days*** – Returns customers with no note entries in the past 30 days.
15. ***No Tasks last 30 days*** – Returns customers with no tasks sent in last 30 days.
16. ***No Services ….. days*** – Returns customers with no countable services in the period selected.
17. ***All History*** – Returns customers who are now or were at one time assigned to the specified counselor.

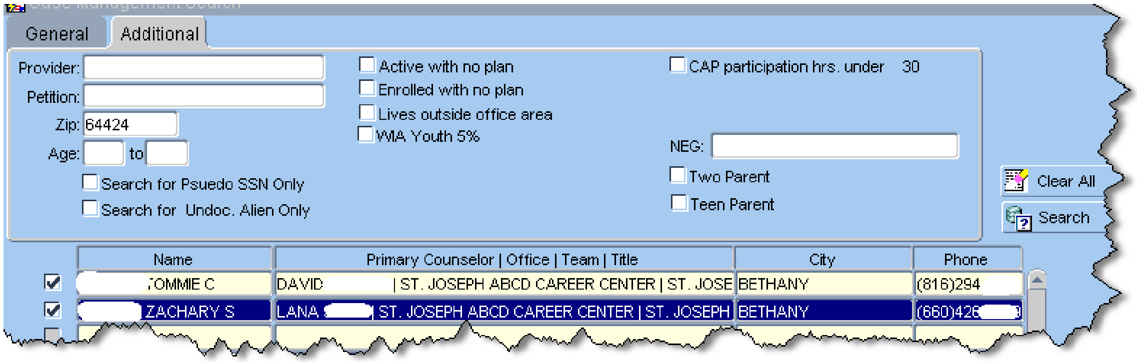
Navigating the Page

Returns Area



1. ***Name*** – Name of customer.
2. ***Primary Counselor/Office/Team/Title*** – Displays this information. It may be necessary to select and wipe across the field to read the items hidden due to lack of column width.
   a. Note that the counselor displaying on the second customer is "Sponge Bob." The search filter is set to return "Both" for Primary/Secondary counselor. I am listed on this case as the Secondary counselor, but the Primary will always display on the return table.
   b. Note that no counselor is displayed for the next to last customer. This is because the filter is set to "All History." I was assigned as the counselor for this customer at one time, but no one is assigned to him at present.
3. ***City*** – Displays the city on the seeker's record.
4. ***Phone*** – Displays the main phone number of the seeker.
5. ***Total Records*** – Displays the number of customers returned.
6. ***Number Selected*** – Displays number of customers selected by the check marks to the left of the name.
   a. This selection marks those to be included in a printout or *Excel* export.
   b. This selection marks those cases to be included in a case reassignment if that function is accessed.
7. ***Destination*** – Double clicking any seeker name navigates to that customer's record. This dropdown allows the selection of the seeker module accessed.
   a. Seeker Info Tab
   b. Assessment
   c. Eligibility/Enrollment
   d. Employment Plan
   e. Seeker History
   f. Testing
   g. Notes
8. ***Select All*** – Selects (checks) all customers.
9. ***Deselect All*** – Deselects (Unchecks) all customers.
10. ***Print Report*** – Prints a complete report on each selected customer including
    a. Primary/Secondary Counselors
    b. Contact Information
    c. Open services and begin dates
    d. Actual/Possible enrollments
    e. Pending appointments
    f. SSN
11. ***Print List*** – Generates a listing of the cases selected.
12. ***Excel*** – Used to export the data to *Excel*.

Case Management Search
“Additional” Tab



1. Provider – Returns customers who are served by a selected education provider.
2. Petition – Returns customers listed on the specified Trade Act Petition
3. Zip – Returns customers within a zip code.
4. Age – Allows restricting search to an age range.
5. Search for Pseudo SSN Only – Returns users in the specified area with a pseudo SSN.
6. Search for Undoc. Alien Only – Returns customers who are checked as Undocumented Aliens.
7. Active with no plan – Customers who are case managed by do not have an active employment plan.
8. Enrolled with no plan – Customers who have an enrollment but have no employment plan.
9. Lives outside office area – Returns customers with zips outside the office area when utilizing the “Team Search.”
10. WIA youth 5% -- Returns Youth in 5% exception.
11. CAP participation hrs under 30 – CAP specific report.
12. NEG – National Emergency Grant
13. Two Parent – CAP specific report
14. Teen Parent – CAP specific report

Troubleshooting Guide

Problem	Explanation	Solution
I did a search for customers served by my office, but other counselor’s clients are displaying.	**“Office” search returns users who live in the office’s labor exchange area – not just those who are served by office staff.**	**Conduct a search using the “Team” search.**
Several of my WIA customers are not displaying when I search for my cases.	**In some cases WIA counselors are assigned as secondary.**	**Click the drop down beside your name and set the search engine for “Both” (primary and secondary).**
In a returned list of my customers, there are counselors from other offices listed.	**The CM display will reflect only the Primary counselor. If you are the secondary on the case, it will not display your name in the return grid.**	**Checking the “Counselor Information” module in the context of this customer will reveal if you are the secondary counselor on the case. (Note: Not all counselors have the “Counselor Information” privilege.)**
In a returned list of customers	**The CM display will reflect**	**Checking the “Counselor**

for our team, counselors for other teams are displayed as primary counselors.	**only the Primary counselor. If one of the members of your team is the secondary on a case, the primary may be another fellow team member or in many cases a team member from another office.**	**Information" module in the context of this customer will reveal if your team member is the secondary counselor on the case. (Note: Not all counselors have the "Counselor Information" privilege.)**
The region search returns customers served by counselors outside my region.	**The region search returns customers who live in the region – not those who are necessarily served in the region.**	**The only practical method to retrieve all cases in a region is to search each team, uploading the results to Excel, then transferring the results to a master Excel table.**
I did a search for customers who were enrolled in WIA between November and December, but a number of my customers where not returned.	**The date range will return customers whose enrollment was established during the range – not those who were currently enrolled during the range.**	**Expand the date range or utilize a different filter.**
I am trying to do a team search, but the drop down displays a different office.	**The team displayed will be set to your log-in location by default.**	**Searches for alternate teams may be accessed in two ways:** **1. Change your login location to the desired location.** **2. Click the office drop down and select the desired office for the team search. Then click the "Team" drop down, and the team for the selected office will appear. Note: If the office does not appear, and you receive a blue line, type the first three letters of the desired team/office in the blank and hit "Tab." It should appear then.**
I need to build a report of all of the customers served by counselors in my region.	**Region search returns customers who live in service area, not who are served by counselors in the region.**	**1. Compile a list of all of the offices in the region with assigned customers.** **2. Use the team search for each location, exporting the list to Excel.** **3. Add a column to the sheet for "Team." Paste the team name beside each customer's name.** **4. Use a master Excel sheet to combine the team lists, using copy/paste.**

I can find the assignments that I need using the team search, but I have to log in to each location to access the team.	**Office/location of login is the default location for "Team" search and is the only location that appears.**	**To view assignments for alternate teams:** **1. Locate the desired location in the "Office" drop down and click on it.** **2. Click on "Team" search drop down and the matching team/teams will appear.** **3. If only a blue line/box appears, type the first two or three letters of the desired location and it should appear.**